SCSEP 40 ANNIVERSARY

SCSEP
SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM

UNITED STATES DEPARTMENT OF LABOR

Division of Older Worker Programs

SCSEP DCS Management Reports Handbook

SCSEP DCS Management Reports Handbook

I. Introduction

Version 2.1 of the SCSEP DCS software contains revised and enhanced versions of the six Standardized Management Reports (reports) and the Ad Hoc Management Reporting Tool (grid views) that were contained in version 2.0 of the DCS. Chapter III of the SCSEP DCS Users' Guide explains how to access these reports and describes their contents. The Mathematica website, under Documentation in the box on the right side of the page, also contains Data Analysis Grid Demos, automated demonstrations of how to use the Ad Hoc Management Reporting Tool.

This Handbook is designed to complement the DCS Users' Guide and the automated demonstrations on the Mathematica web site. While the Mathematica materials explain how to access and customize the reports, this Handbook explains how to interpret the reports and which views are most useful for which purposes. It will focus on how you can use the existing reports, in conjunction with the QPR, to review and evaluate the quality of the information in your database, understand the characteristics of your customers, manage your project, and improve the quality of your services.

The management reports and grid views are very much a work in progress. They are substantially improved over the original release, but they are by no means perfect. This is a learning experience for all of us, and we know that the next release of the reports, SPARQ 2, will result in additional improvements. SPARQ 2 will definitely result in the addition of nine management reports and several grid views. SPARQ 2 is scheduled for release by the end of the first quarter of PY 2006.

The Handbook acknowledges where the reports contain errors or pose difficulties for the user and suggests ways to work around them. The most useful tools are the six standardized management reports (both stand-alone and on the grid) and the five relational grid views based on all applicants. Other grid views can be helpful for specific purposes but are less refined and more problematic.

All reports and grid views export to Excel very easily and cleanly. You merely click on the icon (reports) or export button (grid views) and then save the Excel file in your directory. (If you are exporting from a report, you must choose the box that says: "Save as type:" and choose Excel) Once the report or view is saved in Excel, you can rearrange the data and compute averages and percents. Excel will also allow you to eliminate duplicate records, which can be a problem with several of the grid views if you need to obtain accurate counts. Section III below contains detailed instructions for obtaining counts, percentages, and averages from grid views in Excel.

The discussions of the reports and grid views below contain copies of screens illustrating various ways in which the data can be viewed. To these screen shots legible, you will need to increase the page size to 200%. You can then return the screen size to 100% when you resume reading the text.

II. Standardized Management Reports

The six standardized management reports can be accessed either stand-alone or as grid views. This section of the Handbook discusses how to use each of the reports in stand-alone mode.

The six standardized reports are the same as those contained in DCS version 2.0:

- Active Participant Status Report
- Participant Exit Report
- Participant Follow-up Report
- Overdue Follow-up Report
- Waiting List Report
- Pending Applicant List

SPARQ 2 will contain the following additional standardized management reports:

- Ineligible Applicants
- Eligible applicants Not Assigned or on Waiting List
- Participants Who Have Started Employment but Not Reached 30 Days
- Placed Participants Who Have Not Reached Retention
- Pending Follow-ups by Month
- Host Agencies
- Host Agencies with Active Participants
- Unsubsidized Employers
- Unsubsidized Employers with Active Participants

The reports generally have the same format and display the same information as in the previous version of the DCS. A major exception is the two follow-up reports, which have been totally redesigned. As in the previous version of the DCS, you access these reports by selecting "Reports and Tools" from the main screen, and then "Reports." Choose the report you want to view from the list that is displayed. For ease of viewing, all information is displayed in a single screen view with multiple pages.

All reports can be printed or downloaded to your PC. The data in the reports on the screen are static; you cannot change them while they are viewed in this format. However, as explained in the section on Ad Hoc Management Reporting, you can display these reports in the grid view, which allows you to manipulate the data in a variety of ways. In addition, if you download the reports to your PC, either directly from the reports function or from the grid view function, you can save them in Excel, which will also permit you to manipulate the data.

All reports contain the name of the report on the first page, followed by a row that displays the grantee name and code, the sub-grantee name and code, and the date on which the report was generated. The name of the report appears on each page. The grantee, sub-grantee, and date only appear on the first page for each sub-grantee. If the database contains more than one sub-grantee, data for subsequent sub-grantees will begin on a new page.

Below the row for grantee, each report contains summary data in the form of counts or percentages. If there are multiple sub-grantees, there will be new summary data on the first page of the report for each sub-grantee. Below the summary data are column headings identifying the data displayed in the report. These column headings do not repeat for multiple pages of the report for a single sub-grantee. They do repeat on the first page of the report for additional sub-grantees.

The pages in a report are continuously numbered in the lower right corner. Each page lists its page number and the total number of pages in the report. The participants in each report are listed alphabetically and are also continuously numbered. Like page numbers, the participant numbers do not restart with a new sub-grantee. A participant can have multiple rows of data displayed, e.g., if the participant has multiple assignments, but a participant will only be listed once by name and will only have one report number. These numbers are specific to the report and do not represent unique participant identification numbers. However, the grid views do contain participant ID numbers, which are unique.

A. Active Participant Status Report
Description. This report lists all participants who are assigned to community service on the date the report was run. This includes all participants who have a community service assignment date and no exit date. The summary information at the top of the report displays the total number of active participants for the sub-grantee, the average number of days they have been enrolled in SCSEP (counted from the earliest assignment date of any host agency assignment), and the average number of days they have been in their current host agency.

The report displays the following information for each participant:
- Participant's name
- Participant's phone number
- Date of assignment
- Host agency name
- Host agency contact person
- Contact person's phone number
- Days in program
- Days in current assignment

Although the column heading for host agency name says "Current Host Agency," the report actually lists each host agency to which an active participant has been assigned. Multiple host agencies for a participant are listed by date of assignment. Only the current host agency assignment has the days in current assignment listed in the last column. For any prior assignments, the last column lists "Ended."

Use. This report is the easiest way to get a complete alphabetical listing of all active participants. It tells you when they entered the program, where they are currently assigned and how long they have been there, and where they have been previously assigned. It contains the participant's phone number and the host agency contact person's phone number to facilitate your contacting the participant. If you run this report regularly, it will give you a roster of active participants that staff can refer to when they do not have access to a computer.

B. Participant Exit Report

Description. This report lists all participants who have exited from the program through the date of the report. This includes anyone who has an exit date regardless of the reason for exit. The summary information at the top of the report displays the total number of participants who have exited and what percent of the active participants this represents. The summary also tells you the number of participants exiting for reasons other than unsubsidized employment. If you subtract this number from the total number of exiters, you will have the number who exited for unsubsidized employment. The summary has labels for exit codes A-F and G-K. However, this version of the management reports does not display those summary counts.

The report displays the following information about each participant:

- Participant's name
- Participant's phone number
- Exit date
- Exit for unsubsidized employment
- Placement achieved
- Other reason for exit

If the participant has exited for unsubsidized employment, the report will indicate whether the employment is regular or self-employment. The report will also tell you if the participant has achieved a placement. A "No" in this column means that either the placement has failed or Follow-up 1 has not been completed. For those who did not exit for unsubsidized employment, the last column displays the exit code and reason for exit.

Use. This report is useful for tracking exiters who have started unsubsidized employment but have not yet achieved it or who have recently exited for a reason other than unsubsidized employment and still may be able to be placed. Unlike the Participant Follow-up Report, which tells you which follow-ups you must do for data collection purposes, this report tells you which participants to follow for case management purposes. By focusing on those who have not yet achieved placement (or who have left the program without a job but who may be willing to take a job within 60 days of exit), you may be able to improve your placement rate. For these purposes, the report may be most usefully viewed on the grid, where you can sort by those who exited for unsubsidized employment or those who have not achieved placement. You can also use this report to monitor current case management practices, such as the percent exiting for subsidized employment versus other reasons and whether some of the exits for other reasons could have been avoided.

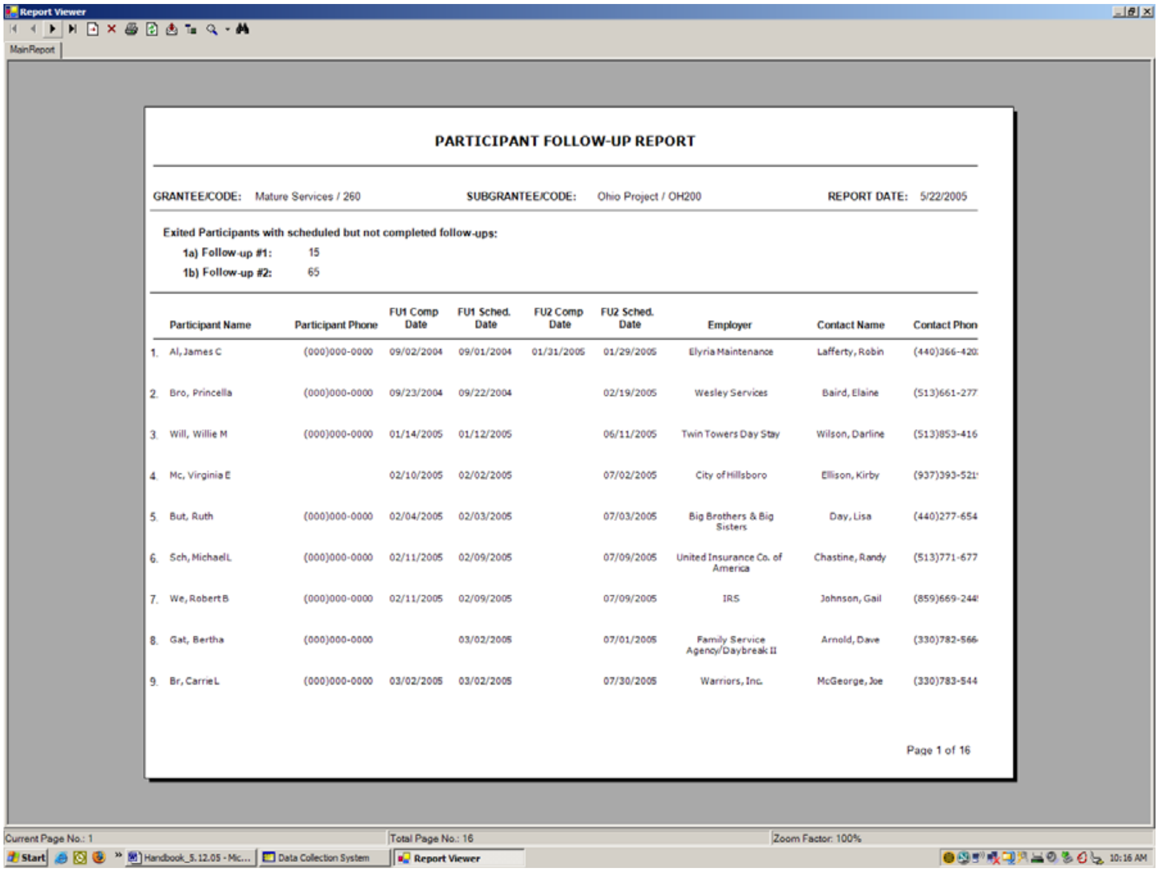
C. Participant Follow-up Report

Description. This report lists all participants for whom Follow-up 1, Follow-up 2, or Follow-up 3 is yet to be done. The display, however, only shows information about Follow-up 1 and Follow-up 2. The report logic includes everyone who: 1) started employment within 60 days of exit, is not excluded (deceased, institutionalized, own health, health of family member), and does not yet have a placement reported; and 2) everyone who has a placement, is not excluded, and does not yet have retention reported; and 3) everyone who is employed and for whom Follow-up 3 has not yet been done. (When you put this report on the grid, you will also see the scheduled and completed dates for Follow-up 3.) Each unsubsidized employment that a participant has is displayed in a separate row for that participant. The summary information at the top of the report gives the number of Follow-up 1's and the number of Follow-up 2's pending.

The report displays the following information for each participant:

- Participant's name
- Participant's phone number
- Follow-up 1 completion date
- Follow-up 1 scheduled date
- Follow-up 2 completion date
- Follow-up 2 scheduled date
- Employer name
- Employer contact person
- Contact person's phone number

The selection criteria and the display for this report are not in synch. As a result, the report lists Follow-up 2's that have been completed, as well as those that are yet to be done, if a Follow-up 3 (which is not displayed) remains to be done. The screen view below illustrates this problem. (To better view this screen shot, increase the page size to 200%. You can return the page size to 100% when you are ready to resume reading the text.) For the first participant listed, the report shows that both Follow-up 1 and Follow-up 2 have been completed. The participant is included in this list of pending follow-ups solely because Follow-up 3 has not been done. However, you must infer that Follow-up 3 is still pending because it is not listed on this report. For this reason, you may wish to view this report only on the grid. In the grid view, all three follow-ups are displayed. See Section III A 3 below for a discussion of the Participant Follow-up Report on the grid. This problem will be addressed in SPARQ 2.



PARTICIPANT FOLLOW-UP REPORT

GRANTEE/CODE: Mature Services / 260 SUBGRANTEE/CODE: Ohio Project / OH200 REPORT DATE: 5/22/2005

Exited Participants with scheduled but not completed follow-ups:
1a) Follow-up #1: 15
1b) Follow-up #2: 65

	Participant Name	Participant Phone	FU1 Comp Date	FU1 Sched. Date	FU2 Comp Date	FU2 Sched. Date	Employer	Contact Name	Contact Phon
1.	Al, James C	(000)000-0000	09/02/2004	09/01/2004	01/31/2005	01/29/2005	Elyria Maintenance	Lafferty, Robin	(440)366-420
2.	Bro, Princella	(000)000-0000	09/23/2004	09/22/2004		02/19/2005	Wesley Services	Baird, Elaine	(513)661-277
3.	Will, Willie M	(000)000-0000	01/14/2005	01/12/2005		06/11/2005	Twin Towers Day Stay	Wilson, Darline	(513)853-416
4.	Mc, Virginia E		02/10/2005	02/02/2005		07/02/2005	City of Hillsboro	Ellison, Kirby	(937)393-521
5.	But, Ruth	(000)000-0000	02/04/2005	02/03/2005		07/03/2005	Big Brothers & Big Sisters	Day, Lisa	(440)277-654
6.	Sch, MichaelL	(000)000-0000	02/11/2005	02/09/2005		07/09/2005	United Insurance Co. of America	Chastine, Randy	(513)771-677
7.	We, Robert B	(000)000-0000	02/11/2005	02/09/2005		07/09/2005	IRS	Johnson, Gail	(859)669-244
8.	Gat, Bertha	(000)000-0000		03/02/2005		07/01/2005	Family Service Agency/Daybreak II	Arnold, Dave	(330)782-566
9.	Br, CarrieL	(000)000-0000	03/02/2005	03/02/2005		07/30/2005	Warriors, Inc.	McGeorge, Joe	(330)783-544

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This report also lists Follow-up 2's that are scheduled to be done when Follow-up 1 has not yet been done. In fact, however, there is no way to know that Follow-up 2 will actually have to be done unless and until there is a placement (Follow-up 1) or unless, despite the absence of a placement, the participant is employed in the quarter after the quarter of exit. The employer listed in a row is the employer for that particular unsubsidized employment. The identification of the employer for Follow-up 2 is based on the assumption that the employment with the Follow-up 1 employer will continue and that there will be no new employment. However, you may have to conduct Follow-up 2 with other employers in addition to or in lieu of the current employer.

Use. This is report is designed to tell you which follow-ups are yet to be done. It is a useful way to tell in a single view which Follow-up 1's and 2's have to be attended to. If the report lists Follow-up 2's that have been completed, you will know that there remain Follow-up 3's to be done for those records. You can see all of the follow-ups that remain to be done if you view this report on the grid. From this report, you may want to make a calendar that can serve a tickler. When a participant appears on the tickler for any follow-up, be sure to check the database to determine which employers you must conduct the follow-up with. The Unsubsidized Employment Form Guide in the revised Handbook has extensive information about the follow-ups.

D. Overdue Follow-up Report

Description. This report uses the same selection criteria as the Participant Follow-up Report, except it is limited to those follow-ups that have not been done within 20 days of the scheduled date. The report will create an entry for a participant if any of the three follow-ups is overdue. Again, only Follow-up 1 and Follow-up 2 are displayed, but the logic used to select listings for the report includes overdue Follow-up 3's. If a Follow-up 2 for an employer displays as having been completed, that means that a Follow-up 3 for that employer is overdue. (If a Follow-up 2 displays as not having been done, the report cannot tell you directly whether Follow-up 3 for that employer is also overdue. You can however, determine that from the dates of employment.) As with the Participant Follow-up Report, when you put this report on the grid, you will also see the scheduled and completed dates for all follow-ups, including Follow-up 3. For this reason, this report is most useful when viewed on the grid. Each unsubsidized employment that a participant has is displayed in a separate row for that participant. The summary information at the top of the page lists the number of overdue follow-ups and the percent of scheduled follow-ups that are overdue. This report displays the same nine columns of information as the Participant Follow-up Report.

Use. This report should be used in conjunction with the Participant Follow-up Report. Despite the problem with the display, it does tell you which follow-ups are 20 or more days beyond the scheduled date. These follow-ups may not be overdue in the sense that you may have time to report them and receive QPR credit in the appropriate quarter. However, it is important to recognize that these follow-ups need attention now.

E. Waiting List Report

Description. This report lists all applicants who are on the waiting list as of the day the report is generated. It includes those applicants who were determined eligible, have not been assigned to community service, and have not withdrawn from the waiting list. The summary information at the top of the report lists the number of applicants on the waiting list and the average number of days they have been on the waiting list.

The report displays the following information for each participant:

- Applicant's name
- Date of eligibility determination
- Gender
- Race
- Ethnicity

The report displays any and all races that the applicant indicated. A "Yes" in the column for Ethnicity means that the applicant is Hispanic. The demographic information displayed in this report is limited to gender, race, and ethnicity. However, you can obtain substantial additional information about applicants on the waiting list by using the "Details" grid view under "All Applications."

Use. This report is designed to help you keep track of applicants on the waiting list and decide which applicants to enroll when authorized positions become available. You should also consult this list before you decide to assign new applicant to see if an applicant on the waiting list has higher priority or preference than a new applicant.

F. Pending Applicant List

Description. This report lists all applicants whose eligibility has not yet been determined. It includes all applicants who have an application date but no eligibility determination date. The summary information at the top of the report lists the number of applicants whose eligibility determination is pending and the average number of days from the application date to the date on which the report is run.

The report displays the following information for each participant:

- Applicant's name
- Application date

No other information about the applicants is displayed in this report. However, you can obtain substantial information about all applicants, including those who have not had an eligibility determination, by using the "Details" grid view under "All Applications."

Use. This report is designed to help you keep track of applicants for whom you have started an application but have not completed it or for whom you have not yet made an eligibility determination.

III. Data Analysis Grid Views

The grid views have five main sections:

- Standardized Management Reports on the Grid
- Relational Grids (All Applications)
- Data Quality Verification
- Utility Grid Views
- Missing Elements (All Participants)

The grid views are a flexible way to review and analyze the data in the DCS. To access the grid views, select "Reports and Tools" on the main screen, then "Data Analysis Grid Views." A complete list of views will be displayed on the left side of the screen. All of the grid views can be printed or exported to Excel.

The grid views are similar to Excel spreadsheets. To enhance your use of the grid views, you need to be able to hide or move columns, freeze columns, expand or contract columns, filter columns, sort columns, and drag columns into the Drop Zone. Chapter III of the SCSEP DCS Users' Guide contains detailed information on how to access and manipulate the grid views. In addition, two Data Grid Demos are available on the MPR SCSEP website under Documentation on the right side of the main page: http://scsep.mathematica-mpr.com/. You should become familiar with these instructions before attempting to manipulate the views.

The filter feature in each column contains a filter for “Blanks.” Selecting this filter will display only those records with missing data in that column. Sorting a column alphabetically will enable you to find multiple instances of the same entity, such as host agencies or contact persons. When these views are exported to Excel, you can perform further manipulation, delete duplicate records, and obtain counts, percentages, and averages. You can also obtain counts by dragging a column heading into the Drop Zone. This creates separate groups for each value in that column. The count for each group is listed along with the value name in the heading of each group.

The following are procedures for obtaining counts, percentages, and averages from the grid views when you have exported them to Excel. Keep in mind that Excel is a very robust program with a lot of different options for doing things. The method presented here is one straightforward way of performing these calculations. Experienced Excel users may have other ways that work better for them.

I. Preliminary steps

A. Open exported grid view in Excel

B. Un-duplicate file if it contains multiple rows for the same participant and you want to obtain counts or other statistics based on unduplicated participant records

1. Sort file by participant ID
2. Find first duplicate record and highlight entire record by clicking on the row number next to the first column
3. Click on Edit, then Delete
4. Move to next duplicate record. Repeat process, or use CTRL Y

II. To obtain ***count of participants with a particular characteristic***

A. Determine which characteristic you wish to count, e.g., priority

B. Locate column corresponding to that characteristic.

C. Click on the cell beneath the last value in that column.

D. Click on the function **(fx)** button on the toolbar. Click on All, and select COUNTIF.

1. Specify the value you want to count (usually Yes or Y)
2. Highlight all of the values above that cell in the column of interest.
3. Hit Enter
4. This should return the count of Yes values in that column.

E. Sometimes you might want to develop subtotals by sorting on one characteristic and then counting another characteristic. You can use the same method described above. Just sort as desired, and follow the instructions to get one count, for example, the participants who are a priority and who have a particular value on a sorting variable, such as employed prior to participation = Yes. You will need a place to put the COUNTIF cell. You can either place it at the bottom of the priority column or insert a row or two between the sorted Yes’s and No’s and place the COUNTIF cell in these rows in the priority column.

III. To obtain ***the percentage of total cases***

A. Click on cell beneath cell containing count.

B. Divide the count in the cell above by the total number of cases. Use the following formula: "= (cell reference for cell containing count)/total cases)." An example of the actual formula would be "= (C119/116)." The total number of cases can be determined by looking at the last row containing a case. Use the number of that row subtracting 1 (to account for the header row). Note: If data are not present for all cases, you should sort the column in descending order (Select: Data, Sort, Column Name, Descending) using the number of cases with Yes or No as the denominator for the percentage).

C. The percentage will appear as a decimal (e.g., .876543). To format this as a percentage, go to Format, Cells, Percentage. Select 1 or 2 decimal places as desired.

IV. To obtain an ***average*** (This should only be done on columns containing real numbers, like days in program or days in assignmen.)

A. Click on a cell in the column immediately following the last case. Click on the function (**fx)** button on the toolbar. Click on Statistical, and select Average. A dialog box will appear that allows you to specify the range. You can actually specify the range by highlighting the values to be averaged, as explained previously using the COUNTIF function. Hit enter. The average will appear in the cell you clicked on at the bottom of the column.

B. You can format the average as desired by going to format, cell, number.

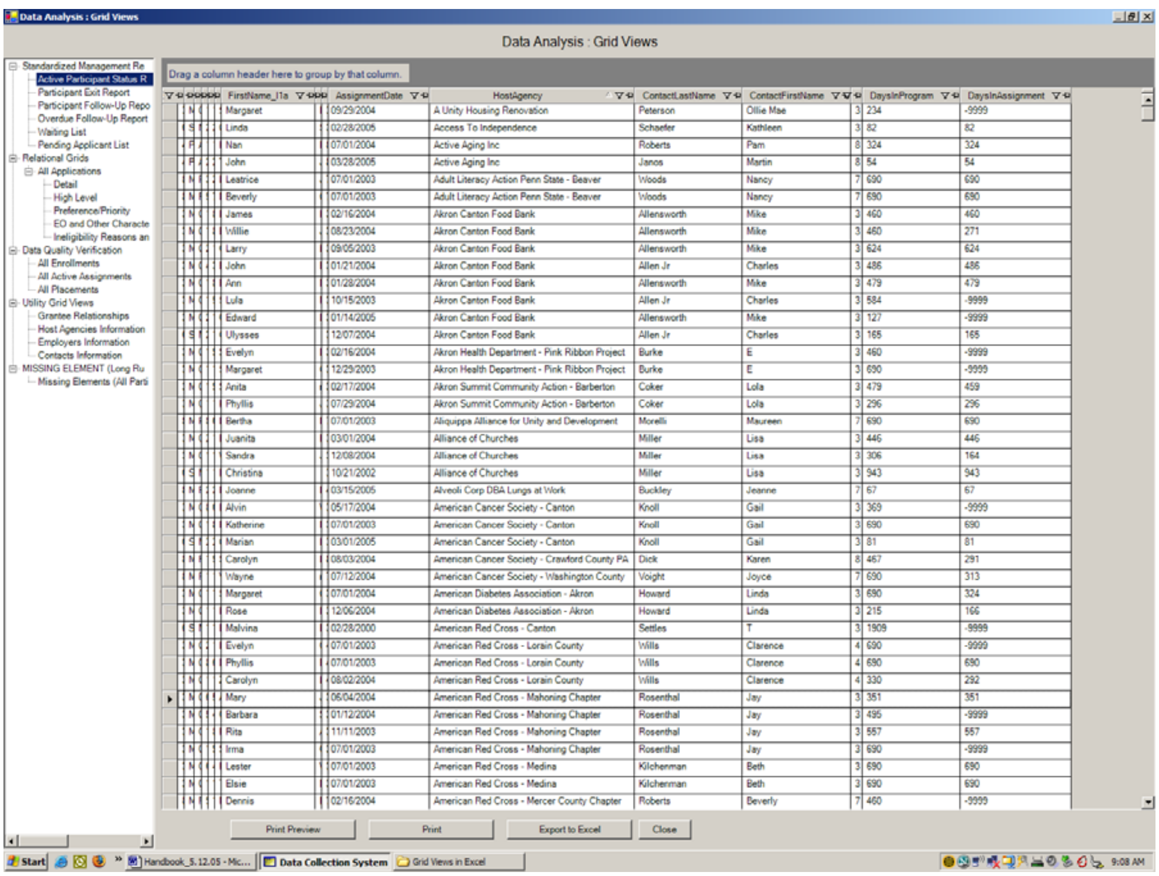
A. Standardized Management Reports on the Grid

All six reports can be viewed on the grid. When placed on the grid, the reports use the same selection criteria and contain all of the data elements that they had in stand-alone mode and some additional data elements (mostly identification numbers) as well. If your database contains only one sub-grantee, you will want to hide the column for sub-grantee name and code or move it to the end so it will not clutter your view. You may wish to do the same with identification numbers, such as participant ID, assignment ID and grantee relationship ID, and grantee name and code. Most users will not need these numbers. To improve your view, you may also want to contract the column for the participant's middle initial and to reduce the size of columns where the labels are longer than the data in the columns. Depending on how you intend to use the report, you may want to contract or move other unnecessary columns as well so that all of the important information is visible at the front of the report. If you have more than one sub-grantee in your database, you may want to drag the column for the sub-grantee name and code into the Drop Zone so your report is grouped by sub-grantee.

1. Active Participant Status Report

This report contains no additional substantive information beyond that found in the stand-alone version. The columns in the grid view of this report are not in an ideal order so you will want to move or contract several of them before working with this report. The report contains a separate row for each assignment that an active participant has had. However, only the current assignment has a calculation for the number of days in assignment. Assignments that have ended have -9999 in the column for days in current assignment. When you sort on this column, the records with -9999 will all appear at the end or the beginning of the column depending on which order you have chosen. You can also do a custom filter to exclude any records with -9999 in that column.

The grid view permits you to sort the participants by length of time in program or length of time in current assignment. This may be helpful in determining whether you have participants who should be considered for rotation or for more aggressive IEPs. You can also sort by host agency if you want to see which participants are assigned to each host agency. The screen print below shows a sort by host agency, displaying all participants who have been assigned to each host agency. Note that several columns of data that were unnecessary to this view have been contracted, as have columns for the participant's last name and middle initial, the participant's phone number, and the contact person's phone number.



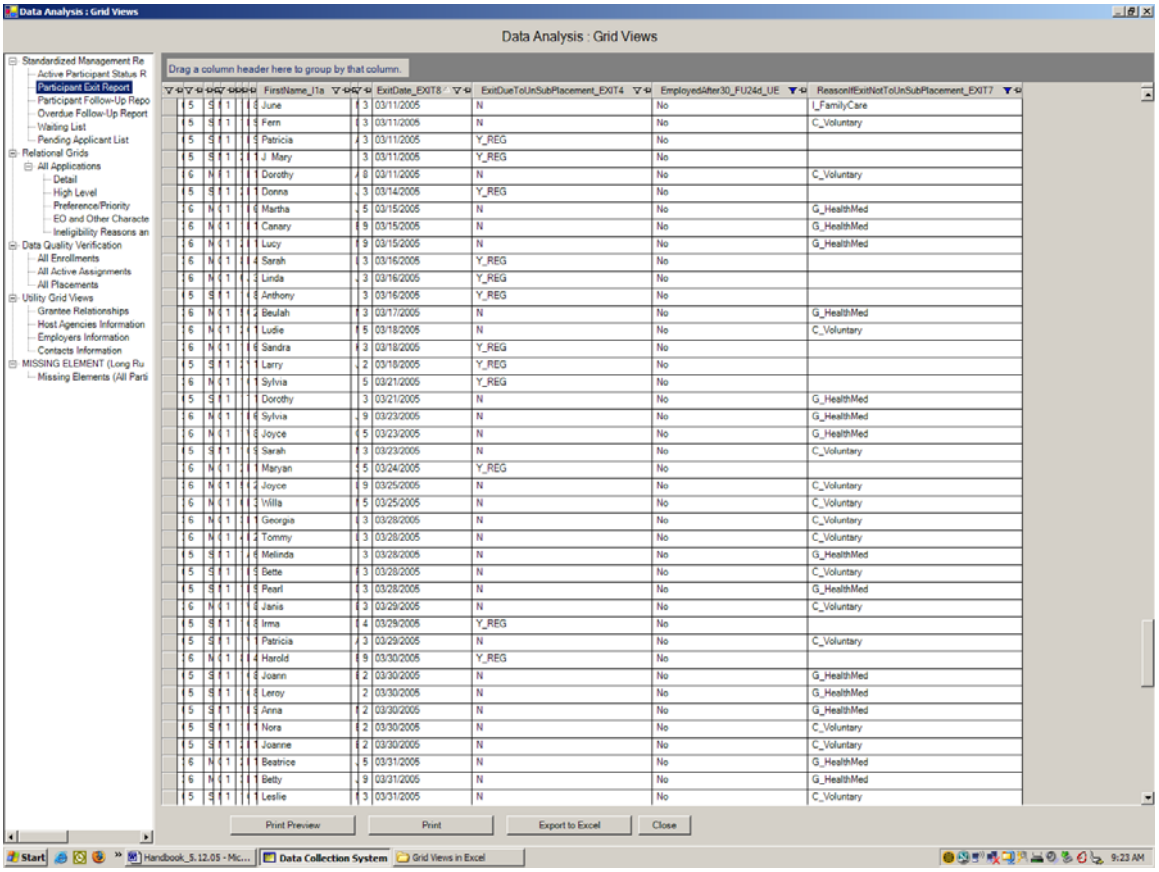
2. Participant Exit Report

This report contains no additional substantive information that is not found in the stand-alone version. The columns in the grid view of this report are not in an ideal order so you will want to move or contract several of them before working with this report. This report contains a single row for each exited participant. The column labeled “Exit Due to Unsub Placement” displays information from field 5 of the Exit Form. It displays the reason for exit at the time of exit; it does not necessarily show everyone who is employed. The next column, ‘Employed after 30,” displays the indicator from field 26d of the Unsubsidized Employment Form. “No” can mean either that the participant has failed to achieve a placement or that the there is no Follow-up 1 information. To know whether it is still possible to achieve a placement for this participant, you will have to look at the exit date to see if 90 days have yet passed. (SPARQ 2 will contain a new report that lists all participants who have begun employment, are within 90 days of exit, and have yet to achieve a placement.) The column, “Reason Exit Not Unsub Placement,” displays the exit reason from field 6 of the Exit Form.

You can use this report to identify participants who have exited within the last 90 days but who have not yet achieved a placement. You could do this by collapsing or moving to the end all columns except those for participant name, exit date, exit for unsubsidized placement, employed after 30 days, and other reasons for exit. First you should sort the exit date column and look only at exits within the last 90 days. Then filter the column for employed after 30 days to give you only the no’s. You now can see everyone who exited for unsubsidized employment, has not yet achieved a placement, and can still make a placement because the exit was within the last 90 days. There is obviously more that you need to know about each of these participants, but at least you have a list to work from.

Similarly, you could look at everyone who exited for a reason other than unsubsidized employment and who might nonetheless be able to achieve a placement. For this group, you would want to look at exit dates within the last 60 days (because they will need 30 days of employment in which to achieve the placement; 60 plus 30 equal 90). Now do a custom filter to eliminate everyone whose exit reason was cause, moved away, or deceased. You will be left with those who exited within the last 60 days for personal reasons that may have changed. You will have to rely on your knowledge of their personal circumstances to know whether it is worthwhile to contact these participants to see if they are interested in a placement.

The following report was run on May 11, 2005. It was filtered and sorted as described in the paragraph above. It shows only those exiters who have not achieved placement. It also excludes those who exited for reasons that would preclude their obtaining a job with your assistance. The exit date was sorted, and the top of the screen starts with those who exited 60 days before the report was run. All participants displayed in this view, whether they exited for unsubsidized employment or for personal reasons, could still achieve a placement in the next 30 days. Several columns, including those for participant’s last name and telephone number, have been contracted.

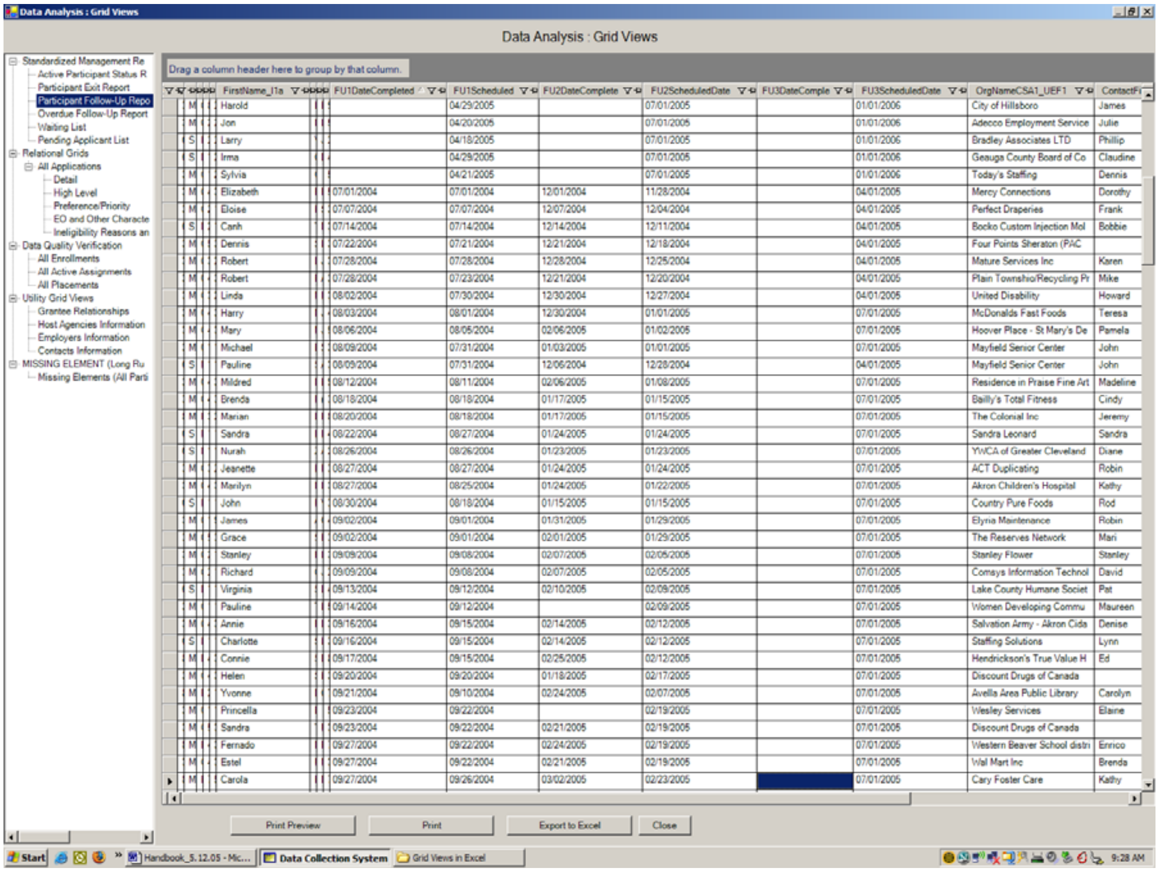


3. Participant Follow-up Report

This report in the grid view contains all of the information on the stand-alone report plus the scheduled and completed dates for Follow-up 3, which are not included on the stand-alone report. If any follow-up is pending, all follow-ups for that participant are listed. If a participant has more than one Unsubsidized Employment record, there will be additional rows of data for that participant. The column labeled "Org Name" lists the name of the employer for that UE record. As with the stand-alone version, you will want to check all unsubsidized employment that the participant has had in order to determine which employers you must contact for which follow-ups.

You can easily see which follow-ups remain to be done by going to the column for the completed date for a particular follow-up and sorting the column. All of the records that do not have a completed follow-up will be at the beginning of the report. You can do the same with each follow-up in turn. Note that when you sort the completed date for Follow-up 2, you will lose the sorting for Follow-up 1. Therefore, you may want to print the report after you sort each follow-up. You can also export the data to Excel and create your own tickler system. SPARQ 2 will contain a new report that will list each pending follow-up by date within a month.

The report below has been sorted by Follow-up 1 completed date. Several columns, including participant's last name and telephone number, have been contracted. Not surprisingly, records that do not have Follow-up 1 completed are also missing the other follow-ups.



Data Analysis : Grid Views

Drag a column header here to group by that column.

	FirstName_l1a	FU1DateCompleted	FU1Scheduled	FU2DateComplete	FU2ScheduledDate	FU3DateComple	FU3ScheduledDate	OrgNameCSA1_UEF1	ContactFi
M	Harold		04/29/2005		07/01/2005		01/01/2006	City of Hillsboro	James
M	Jon		04/20/2005		07/01/2005		01/01/2006	Adecco Employment Service	Julie
S	Larry		04/18/2005		07/01/2005		01/01/2006	Bradley Associates LTD	Phillip
S	Irma		04/29/2005		07/01/2005		01/01/2006	Geauga County Board of Co	Claudine
M	Sylvia		04/21/2005		07/01/2005		01/01/2006	Today's Staffing	Dennis
M	Elizabeth	07/01/2004	07/01/2004	12/01/2004	11/28/2004		04/01/2005	Mercy Connections	Dorothy
M	Eloise	07/07/2004	07/07/2004	12/07/2004	12/04/2004		04/01/2005	Perfect Draperies	Frank
S	Canh	07/14/2004	07/14/2004	12/14/2004	12/11/2004		04/01/2005	Bocko Custom Injection Mol	Bobbie
M	Dennis	07/22/2004	07/21/2004	12/21/2004	12/18/2004		04/01/2005	Four Points Sheraton (PAC	
M	Robert	07/28/2004	07/28/2004	12/28/2004	12/25/2004		04/01/2005	Mature Services Inc	Karen
M	Robert	07/28/2004	07/23/2004	12/21/2004	12/20/2004		04/01/2005	Plain Townshio/Recycling Pr	Mike
M	Linda	08/02/2004	07/30/2004	12/30/2004	12/27/2004		04/01/2005	United Disability	Howard
M	Harry	08/03/2004	08/01/2004	12/30/2004	01/01/2005		07/01/2005	McDonalds Fast Foods	Teresa
M	Mary	08/06/2004	08/05/2004	02/06/2005	01/02/2005		07/01/2005	Hoover Place - St Mary's De	Pamela
M	Michael	08/09/2004	07/31/2004	01/03/2005	01/01/2005		07/01/2005	Mayfield Senior Center	John
S	Pauline	08/09/2004	07/31/2004	12/06/2004	12/28/2004		04/01/2005	Mayfield Senior Center	John
M	Mildred	08/12/2004	08/11/2004	02/06/2005	01/08/2005		07/01/2005	Residence in Praise Fine Art	Madeline
M	Brenda	08/18/2004	08/18/2004	01/17/2005	01/15/2005		07/01/2005	Bailly's Total Fitness	Cindy
M	Marian	08/20/2004	08/18/2004	01/17/2005	01/15/2005		07/01/2005	The Colonial Inc	Jeremy
S	Sandra	08/22/2004	08/27/2004	01/24/2005	01/24/2005		07/01/2005	Sandra Leonard	Sandra
S	Nurah	08/26/2004	08/26/2004	01/23/2005	01/23/2005		07/01/2005	YWCA of Greater Cleveland	Diane
M	Jeanette	08/27/2004	08/27/2004	01/24/2005	01/24/2005		07/01/2005	ACT Duplicating	Robin
M	Marilyn	08/27/2004	08/25/2004	01/24/2005	01/22/2005		07/01/2005	Akron Children's Hospital	Kathy
S	John	08/30/2004	08/18/2004	01/15/2005	01/15/2005		07/01/2005	Country Pure Foods	Rod
M	James	09/02/2004	09/01/2004	01/31/2005	01/29/2005		07/01/2005	Elyria Maintenance	Robin
M	Grace	09/02/2004	09/01/2004	02/01/2005	01/29/2005		07/01/2005	The Reserves Network	Mari
M	Stanley	09/09/2004	09/08/2004	02/07/2005	02/05/2005		07/01/2005	Stanley Flower	Stanley
M	Richard	09/09/2004	09/08/2004	02/07/2005	02/05/2005		07/01/2005	Comsys Information Technol	David
S	Virginia	09/13/2004	09/12/2004	02/10/2005	02/09/2005		07/01/2005	Lake County Humane Societ	Pat
M	Pauline	09/14/2004	09/12/2004		02/09/2005		07/01/2005	Women Developing Commu	Maureen
M	Annie	09/16/2004	09/15/2004	02/14/2005	02/12/2005		07/01/2005	Salvation Army - Akron Cida	Denise
S	Charlotte	09/16/2004	09/15/2004	02/14/2005	02/12/2005		07/01/2005	Staffing Solutions	Lynn
M	Connie	09/17/2004	09/15/2004	02/25/2005	02/12/2005		07/01/2005	Hendrickson's True Value H	Ed
M	Helen	09/20/2004	09/20/2004	01/18/2005	02/17/2005		07/01/2005	Discount Drugs of Canada	
M	Yvonne	09/21/2004	09/10/2004	02/24/2005	02/07/2005		07/01/2005	Avella Area Public Library	Carolyn
M	Princella	09/23/2004	09/22/2004		02/19/2005		07/01/2005	Wesley Services	Elaine
M	Sandra	09/23/2004	09/22/2004	02/21/2005	02/19/2005		07/01/2005	Discount Drugs of Canada	
M	Fernado	09/27/2004	09/22/2004	02/24/2005	02/19/2005		07/01/2005	Western Beaver School distri	Enrico
M	Estel	09/27/2004	09/22/2004	02/21/2005	02/19/2005		07/01/2005	Wal Mart Inc	Brenda
M	Carola	09/27/2004	09/26/2004	03/02/2005	02/23/2005		07/01/2005	Cary Foster Care	Kathy

Print Preview | Print | Export to Excel | Close

4. Overdue Follow-up Report

This report in the grid view contains all of the information on the stand-alone report plus the scheduled and completed dates for Follow-up 3, which are not included on the stand-alone report. Each unsubsidized employment for a participant is presented on a separate row. If any follow-up is overdue (more than 20 days past the scheduled date), all follow-ups for that participant are listed. The column labeled "Org Name" lists the name of the employer for that UE record. As with the stand-alone version, you will want to check all unsubsidized employment the participant has had in order to determine which employers you must contact for which follow-ups.

As with the Participant Follow-up Report, you may want to sort each follow-up individually to identify which participants need which follow-ups. For example, if you sort the column for Follow-up 1, all participants who are missing that follow-up will be at the top of the list. You will get a different list if you then sort on the column for Follow-up 2 so you may wish to print the report after you sort each column.

5. Waiting List

This report contains no additional substantive information that is not found in the stand-alone version. You might want to sort this list by date of eligibility determination to see how long applicants have been waiting to be assigned. You might also want to sort by gender, race, or ethnicity to determine the characteristics of the applicants on your waiting list.

6. Pending Applicant List

This report contains no additional substantive information that is not found in the stand-alone version. You might want to sort this list by application date to see how long applications have been waiting to be completed.

B. Relational Grids (All Applications)

This is the most robust section of the Data Analysis Grid Views. There are five views in this section based on all applicants in the database:

- Detail
- High Level
- Priority/Preference
- EO and Other Characteristics
- Ineligibility Reasons and Actions

SPARQ 2 will contain two additional views: Community Service Detail and Factors Potentially Affecting Outcomes.

The most comprehensive grid view is Detail, which contains 61 columns of data. The other four views are specialized views that contain subsets of the data in Detail. In a few instances, they contain more discrete data than those found in the Detail view. For example, Detail contains a constructed variable for minority. (A constructed variable is a data element that does not exist in the database. It is a composite or summary of individual variables that do exist in the database.) A "Yes" in the column for minority indicates that the applicant has selected one or more races other than "white." The view for EO and Other Characteristics contains the constructed variable for minority but also contains complete information on all races selected by the applicant.

The views in this section also contain constructed variables for priority (veteran or 60 and over), preference (minority, Hispanic, isolation, disability, other social barriers, displaced homemaker, poor employment prospects, literacy deficiency, LEP, or below poverty), economic barriers (displaced homemaker, poor employment prospects, or below poverty), and social barriers (isolation, disability, other social barriers, LEP, literacy deficiency, minority, or Hispanic). A "Yes" in the column for any of these constructed variables means that the participant also has a "Yes" for one or more of the variables that we re used to create the constructed variable. There are also constructed variables for days in program, days in assignment, total number of assignments, receiving public assistance, education (less than high school diploma, high school diploma, some college, BA/BS or higher), co-enrollment in Section 502(e) (same program or another program), and thirty day placement/placed (achieved a placement). Sometimes these constructed variables are displayed in lieu of the individual data elements, and sometimes they are displayed in addition to the individual data elements. If you do not wish to see the level of detail provided by the individual data elements, you can hide or move those columns.

1. Detail
This is the most comprehensive and useful view. It is the only view that combines detailed information about the applicant, the assignment, and the placement. An applicant has a separate row for each assignment and placement. The column labeled "Total Assignments" will tell you whether the multiple rows are due to multiple assignments or multiple placements. (For participants who are still enrolled, you can actually see each assignment from the All Active Participants report.) Therefore, applicants may be listed multiple times with the same characteristics. Even the columns for assignments and placements list the same data when there are multiple rows because the data displayed are a composite across each assignment or placement that the participant had. For example, the column for CSA training hours counts all paid training received at any and all host agencies; the unsubsidized employment starting wage is an average of all UE starting wages. This problem will be fixed in SPARQ 2.

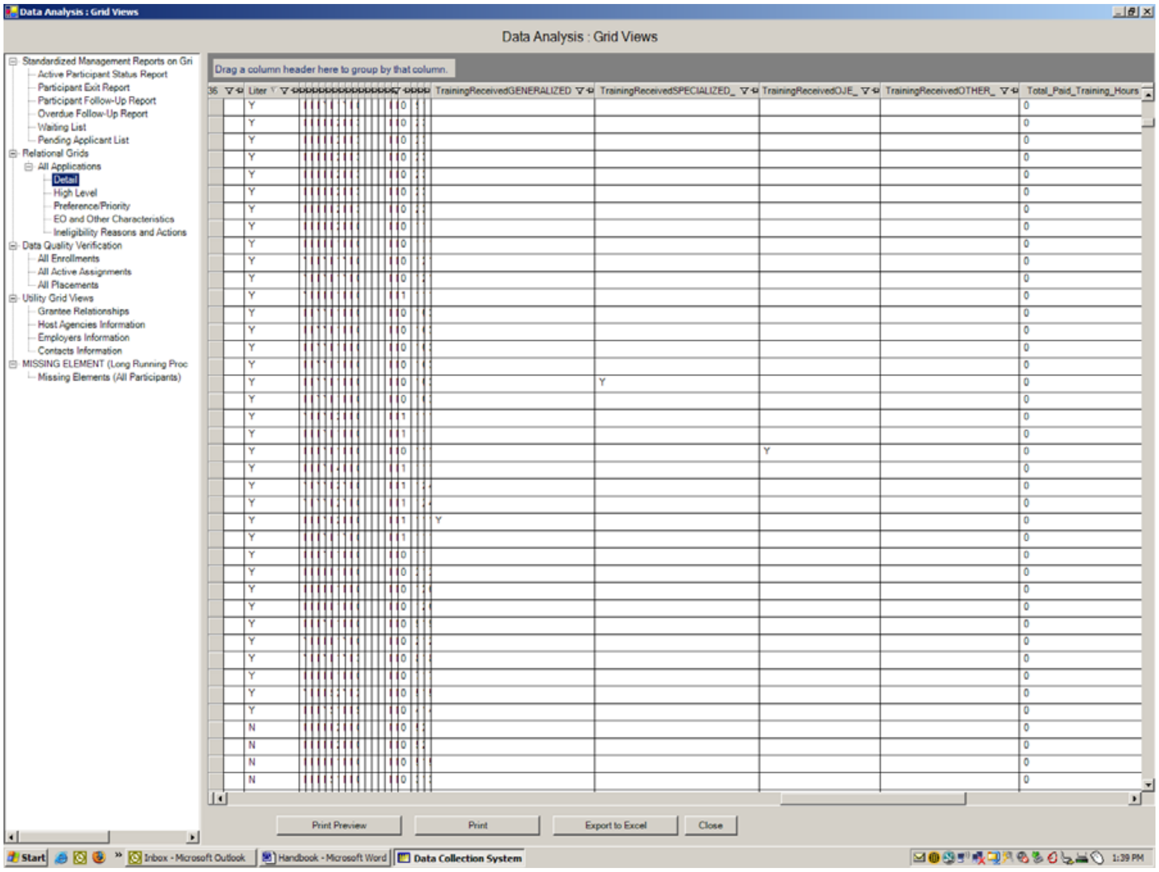
This view contains too many columns to be used as a single report, but it allows you to sort or filter based on status and then look at any or all characteristics or services for individuals with that status. You can determine pending applicants by selecting those without an eligibility date. You can determine ineligible applicants by sorting on the column for "eligible" and selecting those with "no." Similarly, you can identify those on the waiting list, those who have been assigned to community service, those who have exited, and those who have been placed.

Once you have determined what status you want to examine, you can then look at any characteristics of the individuals who have that status. For example, you could select pending applicants, and see whether they are priority or preference candidates, whether they are minorities, and how much education they have.

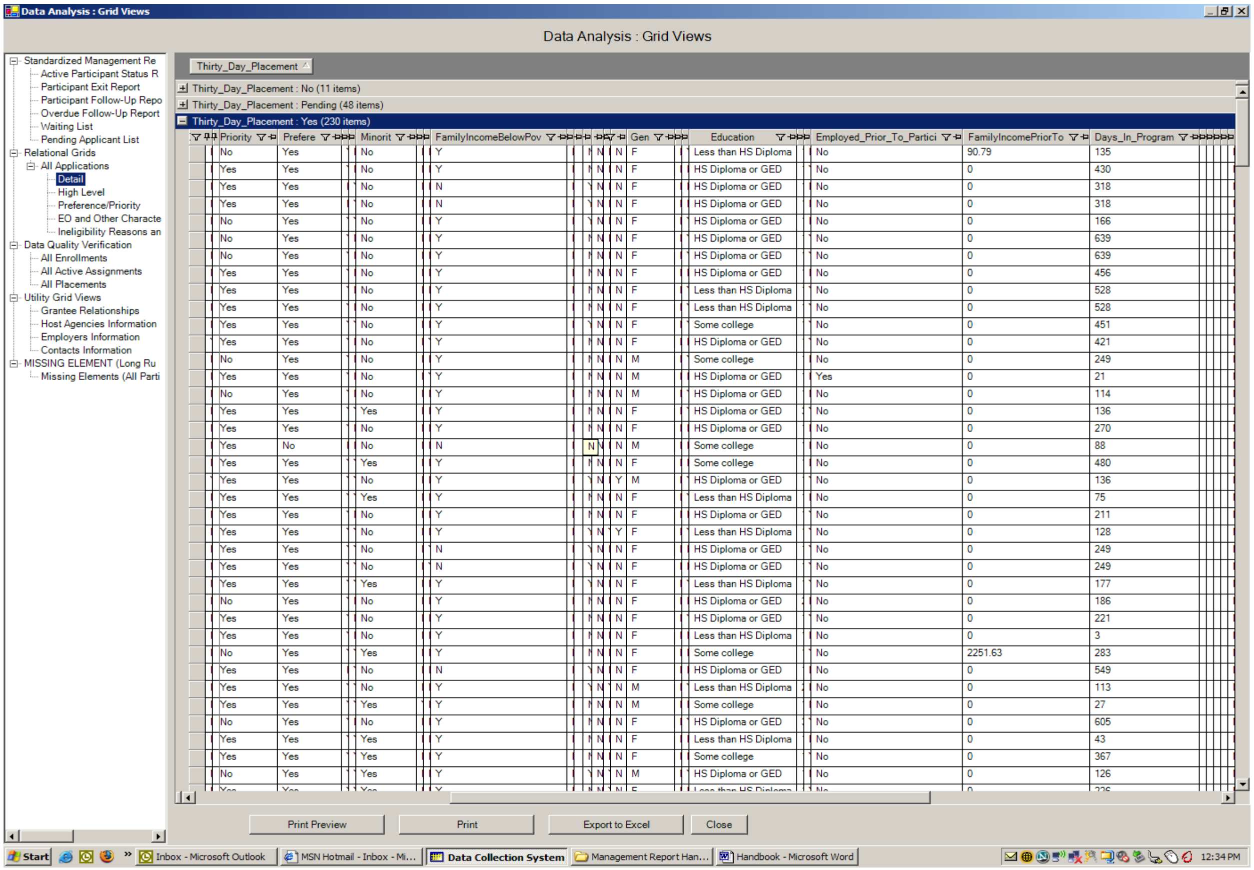
This view is useful for locating missing data. You can sort or filter any column to determine which records have missing data for that field. If you filter to get only the blanks and then drag the column heading into the Drop Zone, you will get a count of records missing data in that field.

You can also use this view to identify those who have been in the program or in their current assignment for a certain period or those who have had multiple assignments. You can see how many of your active participants are co-enrolled in WIA, or who your Spanish-speaking or illiterate participants are and whether they have been receiving paid training. You can determine how many of your participants are urban versus rural. You can even use the zip codes to display the data in a Geographical Information System. The possibilities are almost limitless. Because this view contains nearly all substantive information in the database, this view almost gives you ad hoc query capability.

The view below shows all of the training information for participants who are literacy skills deficient.



You can also use the Detail view to analyze outcomes by participant characteristics. For example, you can filter on the column for unsubsidized employment and limit your data to participants who have started unsubsidized employment. You can then drag the column for thirty-day placement into the Drop Zone. This will give you three groups of records based on placement status: no, pending, and yes. (In this view, pending means that Follow-up 1 has not yet been done.) If you expand any or all of these groups, you can display those characteristics you are most interested in and then filter or sort on any of those characteristics. The view below shows priority, preference, income below poverty, gender, education, employment prior to participation, wages prior to participation, and days in program for the 230 records where a placement was achieved. None of these characteristics has yet been sorted or filtered, but any of them could be. By exporting this view to Excel, you can do further analysis or calculate counts and percentages. For example, in this view, 9.8% of those who achieved placement had income in the quarter before the quarter of participation, and 4.3% were employed prior to participation. In contrast, none of those who did not achieve placement had income in the quarter before the quarter of participation and 20% were employed prior to participation. This last number is anomalous, perhaps because there were so few participants in this group who did not achieve a placement.



2. High Level

This view also lists all applicants but only displays certain critical information about them: eligible, exited, placed, priority, preference, days in program, and days in current assignment. Like the Detail view, an applicant is listed multiple times if there are multiple assignments or placements. You should ignore the multiple listings. This error will be fixed in SPARQ 2.

This view is a quick way of seeing the status of all of your applicants. Since the view is so limited in what it displays, you can use this view like a report if you wish. As with the other views, you can easily sort or filter to isolate only active participants or exiters, or those who have achieved a placement.

3. Preference/Priority

This view gives you the constructed variables for priority and preference and also displays all of the individual data elements that comprise those constructed variables. In addition, there are columns for eligible and exited so you can limit your view to a particular status. There are also columns for county and urban/rural, which you can use for planning or equitable distribution.

4. EO and Other Characteristics

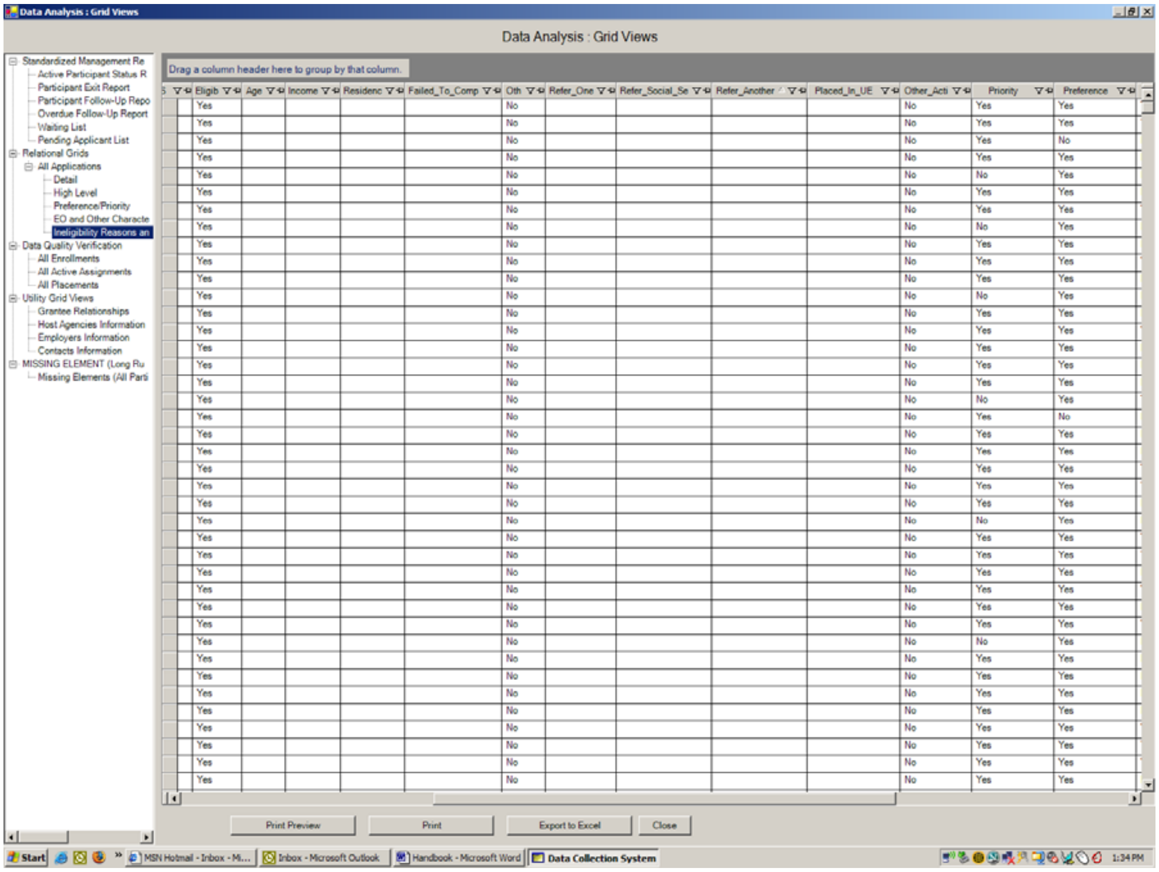
This view provides data on 60 and over, gender, the constructed variable for minority, details on race, ethnicity, disability, LEP and primary language, the constructed variable for public assistance, details on public assistance, homeless, education, and family size. In addition, there are columns for eligible and exited so you can limit your view to a particular status. There are also columns for county and urban/rural, which you can use for planning or equitable distribution. The columns are somewhat out of order and will need rearranging.

5. Ineligibility Reasons and Actions

The view is designed to provide detailed information about ineligible applicants, including the reason for the ineligibility and the action taken. It also provides high level characteristics: priority, preference, minority, gender, urban/rural, county, and family size. The columns are slightly out of order. Before working with this view, you will want to make sure that the five reasons for ineligibility (age, income, residence, failed to complete application, and other reason) and the five actions taken (referred to one-stop, referred to social services, referred to another project, placed in UE, and other action taken) are in order.

You can then either sort or filter the eligible column to create the list of ineligible applicants. If you filter, you will be working only with ineligibles. You can also drag the eligible column into the Drop Zone and create two separate groups: eligibles and ineligibles. You can then select any reason for ineligibility, such as income, and sort on that column to see all the applicants who were determined ineligible due to income. Alternatively, you can see all the ineligible applicants whom you referred to the one-stop center or placed in unsubsidized employment under an MOU. You can also look at the characteristics of the ineligible applicants (or any sub-group of them) and compare them to the characteristics of your participants.

In the view below, all of the applicants were eligible because the database used for the view did not contain any ineligible applicants. However, you can see the five columns for reason for ineligibility and the five columns for action taken, as well as the columns for priority and preference.



C. Data Quality Verification

Unlike the prior grid views, which were designed to give you a particular focus on the data, the three views in this section are designed to facilitate verifying the data that you entered into the DCS. They are organized according to the sections of the DCS main page -- Enrollments, Assignments, and Placements – and display the data fields in each of those sections. The views also contain additional identifying information about the grantee and sub-grantee, along with several different identification numbers.

These views are useful for determining missing data. You can sort or filter any column to determine which records have missing data for that field. If you filter to get only the blanks and then drag the column heading into the Drop Zone, you will get a count of records missing data in that field.

These views have a few limitations:

- Due to space constraints, the views are limited to 99 columns of data. As a result, not all of the data fields in the Enrollments and Assignments sections of the DCS are displayed. The Placement section data are entirely displayed.
- The view labeled All Active Assignments does not in fact contain all the data to be found in the Assignments section of the DCS. In addition, it contains some data found in the Enrollments section of the DCS. The fields are not in the order in which you would have entered the data.

- The column headings for the All Placements view refer to organization instead of employer and assignment instead of placement. Furthermore, the column for wages in the quarter after the quarter of exit displays a series of codes rather than the actual dollar amounts.

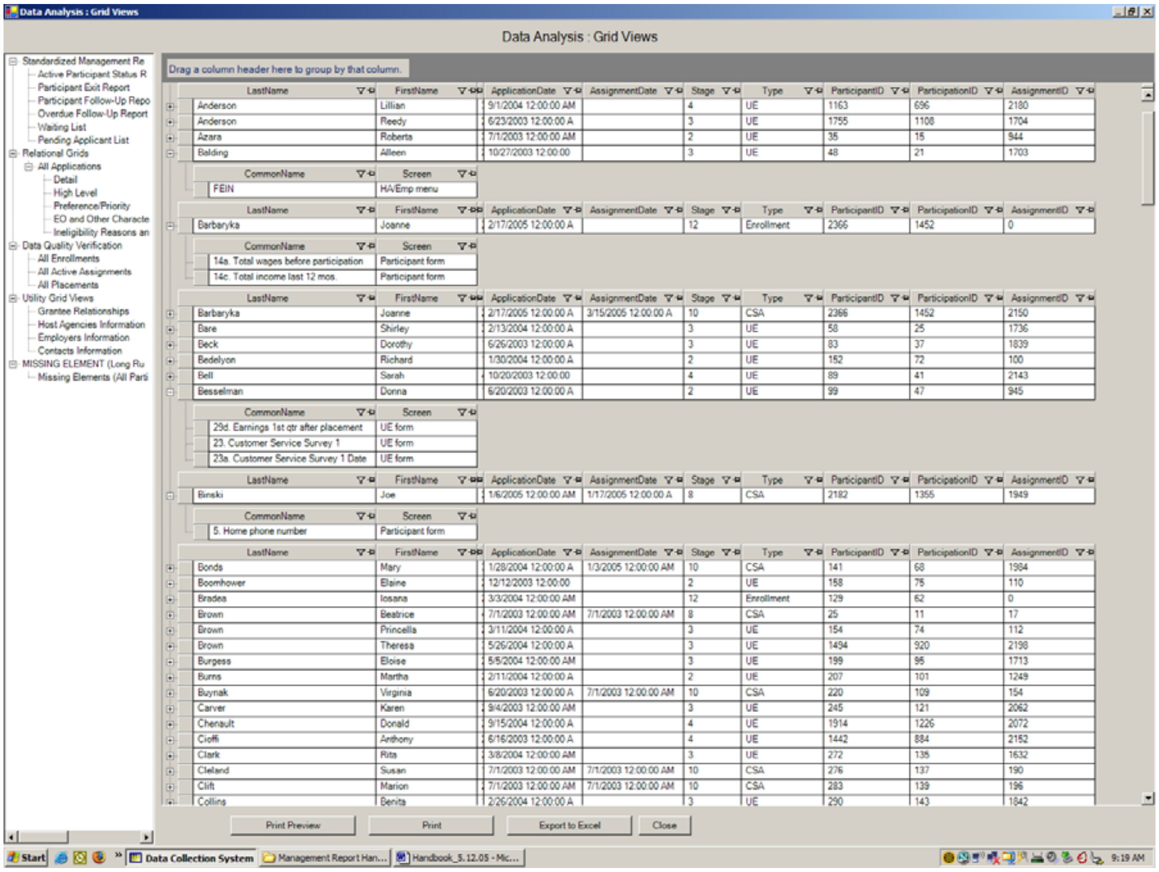
D. Utility Grid Views

This section of the Data Analysis Grid Views presents the data contained in the three tabs under Manage Utility Data on the main page of the DCS. The first view, Grantee Relationships, displays all the data found under the same tab in the DCS. The second and third views, Host Agencies Information and Employers Information, contain all of the data contained under the host agencies and employers tabs in the DCS, except for the contact information. That information is presented in the fourth view, Contacts Information. The columns for these views are not always in order, and the column labels may be somewhat confusing.

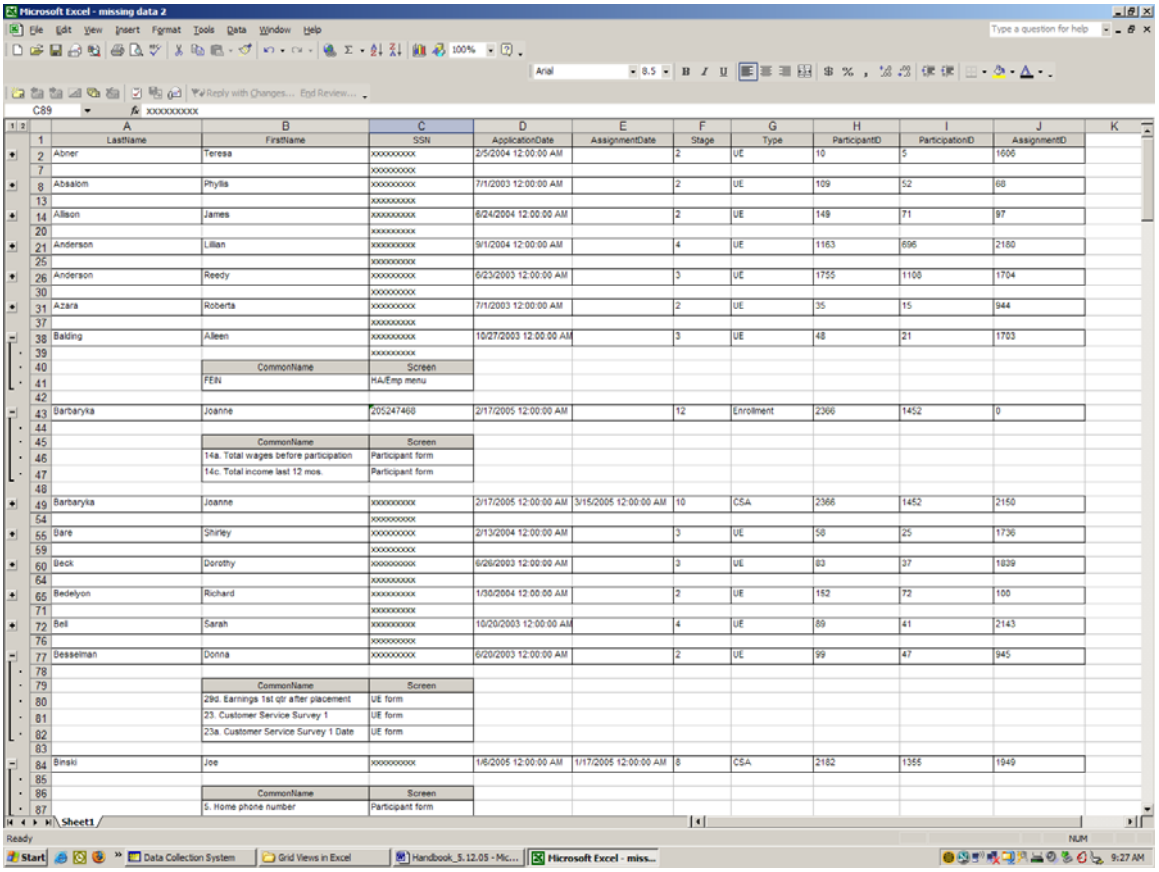
E. Missing Elements (All Participants)

This section of the data grid views presents every active participant who has any data element missing, as determined by the DCS stages. The logic for this report is the same as that used in the preview function on the main page of the DCS and in the DQRs. The report merely tells you that a field is missing data when, given the stage of the record, it could have a value entered. If you have deliberately left a field blank because you cannot obtain the information or because you are not required to enter it, you should ignore the missing data message. Because this view must process large amounts of data, it can take several minutes to run. While small databases may run in a minute or two, the largest DCS databases may take 30 minutes or more. For this reason, you may wish to export the view to Excel as soon as it is run. This will enable you to save and re-use the information without having to run the view again. You can display and manipulate data in Excel as easily as you can in the grid view.

The view initially displays only the following information: participant's name, Social Security number, application date, assignment date, stage, record type (enrollment, assignment (CSA), and placement (UE)), and several identification numbers. Each record has a plus sign in the left margin. When you click on this sign, the missing data for that record are displayed. The missing data display lists the form number and name of the missing element (Common Name) and the form where the element is found. The screen view below shows the alphabetical listing of participants with the missing data for several participants displayed. The column for the participant's Social Security number has been contracted.



This view in Excel looks nearly the same as the grid view. It, too, lets you expand the record of any participant to display the missing data elements:



The missing data view treats the missing data for each of the three record types (enrollment, assignment, and placement) cumulatively. That is, if a participant has missing enrollment data and also has an assignment, the participant will be listed twice, and the missing enrollment data will be displayed under both the enrollment listing and the assignment listing even if there are no assignment data missing. This problem will be fixed in SPARQ 2.

As with all grid views, you can drag a column heading into the Drop Zone to create separate lists for each value of that column. For the missing data grid view, you might want to drag the column for “Type” into the Drop Zone to create separate lists of all the enrollment, assignment, and placement records that are missing data. Alternatively, you could sort the type column to display the three types of records in groups. It would make sense to add any missing data to the enrollment records first since the missing data message will continue to be displayed for all other record types until the enrollment data are complete.